



Instructional Services
presents

EndNote 3 (Windows)

<http://www.isiresearchsoft.com>

Training Schedule: <http://nihlibrary.nih.gov/seminars/seminarschedule.htm>

Course Objectives:

1. Create, open and close a library.
2. Create a new reference, edit a reference, search for a reference, find duplicate references.
3. Import references from databases such as PubMed and Web of Science using appropriate filters.
4. Use connection files to search PubMed and OVID remotely.
5. Use EndNote with Word to insert citations and format the document references and bibliography in different journal styles.

Introducing EndNote

EndNote is:

- a **Reference Database**—it specializes in storing, managing, and searching for bibliographic references in your private reference library.
- an **Online Search Tool**—it provides a simple way to search online bibliographic databases and retrieve the references directly into EndNote. EndNote can also import data files saved from a variety of online services, CD-ROMs, and library databases.
- a **Bibliography Maker**—it builds lists of cited works automatically. Use EndNote to insert citations into word processing documents and later scan those documents for in-text citations to compile a bibliography in any format that you need. If you use Microsoft Word or Corel WordPerfect, the EndNote Add-ins integrate seamlessly with your word processor.

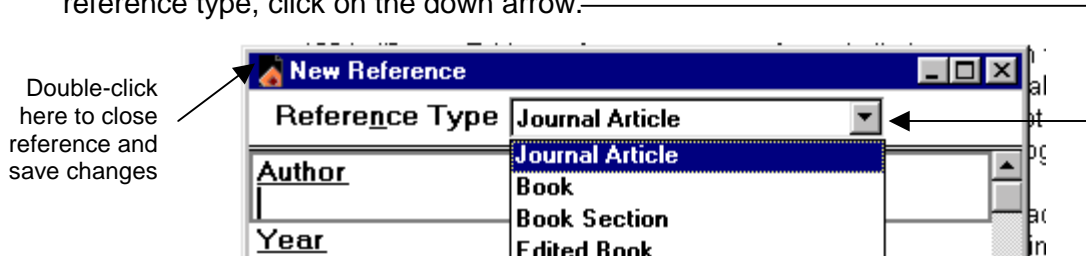
The EndNote Library

An EndNote library is a collection of references, each containing the information required for the creation of a bibliography. Additional information such as keywords, notes, and abstracts can also be stored in these references.

- Each library can store up to 32,000 references or grow to be 32 MEGABYTES—whichever comes first.
- The Library window displays the first author, year, and title of each reference, sorted in alphabetical order by first author.
- There is no limit to the number of libraries you can create.
- Libraries created with the Macintosh or DOS versions of EndNote can be used by the Windows version of EndNote, and vice versa.
- Each library is a separate file that can be independently moved, copied, renamed or deleted.

Creating References Manually

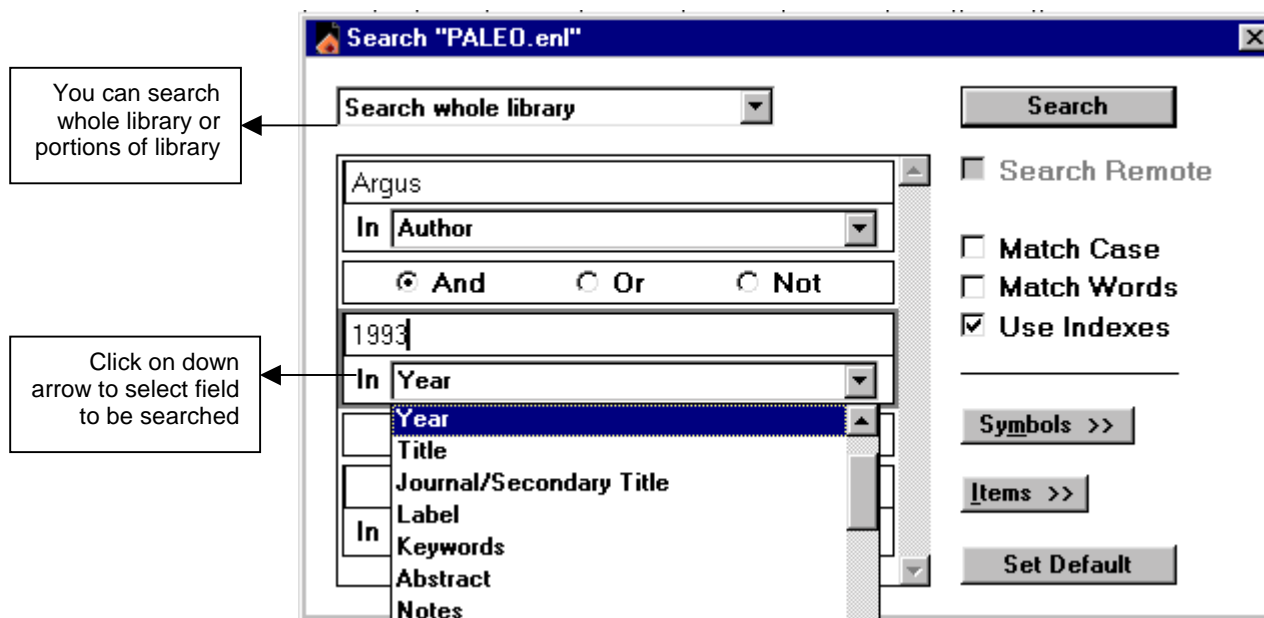
- Choose **New (Ctrl+N)** from the References menu.
- New references are assigned the Journal Article reference type by default. To select a new reference type, click on the down arrow.



- New references also can be created by importing them from other files, or by pasting references copied from other libraries (see Importing References section for more information.)

Editing References

- The reference type for the record can be selected from a list that appears at the top of the window.
- Press the Tab key to select the next field in the reference
- Press Shift+Tab to select the previous field.
- Double-click on the System Menu in the upper left-hand corner of the window, or press Ctrl+W to close the reference and save any changes.



Selecting references

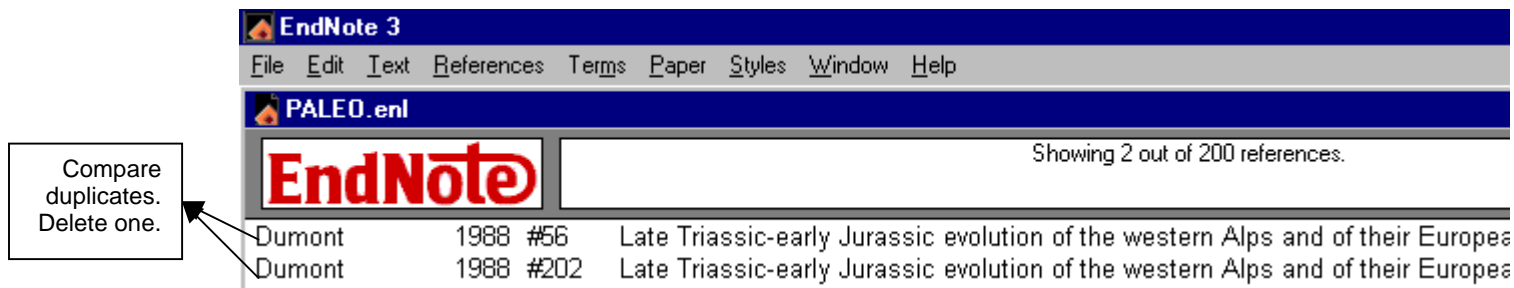
- To select one reference, click on it with the mouse.
- To select a range of references, hold down the Shift key down while dragging the mouse over the desired range.
- To select references not in a range, hold the Ctrl key down while clicking the desired references.
- To select all references showing in the library window, choose Select All from the Edit menu.

Searching For References

- Choose **Search (CTRL+F)** from the References menu.
- Enter the word or phrase you are searching for as the first search term in the Search Window. Add other search terms as required. You can specify which field should be searched.
- Press Enter or click the Search button.

Finding duplicate references

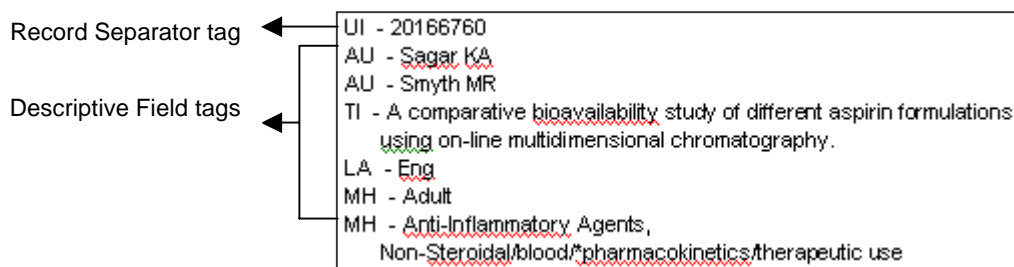
- Use the **Find Duplicates** command is used to identify duplicate references in a library.
- References are considered duplicates if the contents of the authors, year, title, and reference type fields are identical. Author names are compared only with regard to surname and first initial. Leading articles in titles ("A", "An", or "The") are ignored, as is capitalization.
- After the search is complete, all duplicate references will be shown in the library. Duplicate records should be compared to determine which reference in the pair should be deleted.



Importing References:

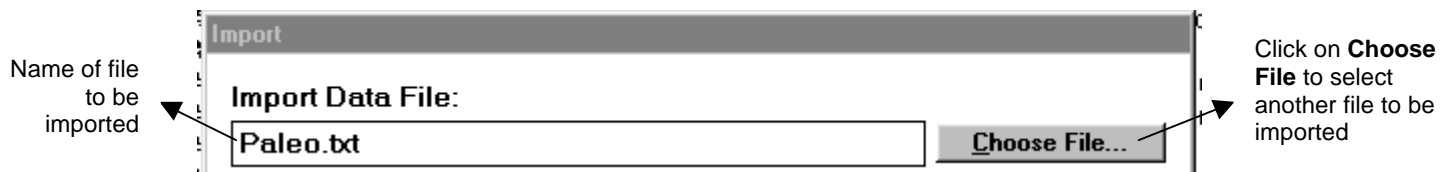
In EndNote you can add records to your database electronically by importing records from bibliographic citation databases such as MEDLINE, Web of Science, etc. You use filters to read and transfer tagged records retrieved from these various services. The filter tells EndNote how a file of tagged records is organized, including how to identify the beginning of a new record and the beginning of a new field. It also maps each field tag to a corresponding EndNote Field. The most significant part of importing tagged records is to determine from which service the records were retrieved. For example, the same MEDLINE record can be retrieved from PubMed or from the OVID system. Each service saves the same information in a slightly different tagged format. The appropriate service filter must be used for the record to be imported correctly.

Example of a tagged PubMed output. Each field in record is preceded by a descriptive tag.

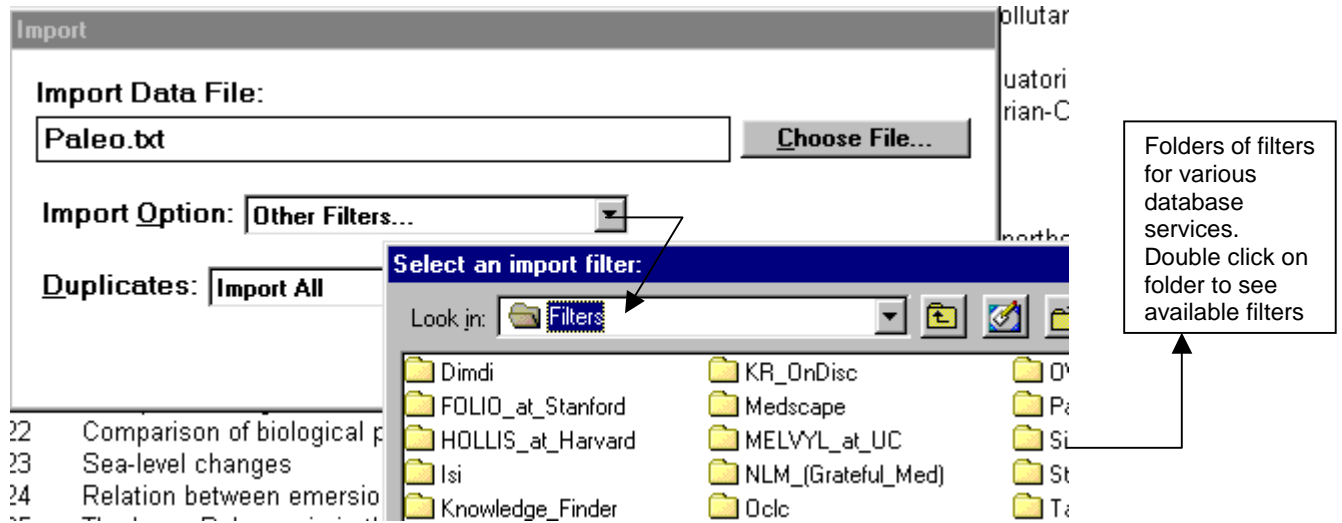


Importing Step-by-Step

1. Save bibliographic records from your online service, (MEDLINE, Web of Science, etc) in a tagged or labeled output as a plain text file. (See **Downloading Formats** for more assistance.)
2. Open the library into which you want to add references. We recommend that you create a new library for this purpose for all import formats, except EndNote libraries, in case there are problems with the data file. These libraries can be imported into your main library after the results are checked.
3. Choose **Import...** from the File menu.
4. Click the Choose File button in the Import dialog, and select the data file you want to import.



5. Select the import format from the Import Options list. If you want to use an import filter that does not appear in the import options list, select "Other Filters..." and locate the filter you want to use. (The filter component of an EndNote connection file also can be used as a filter; Choose "Use Connection File..." to use a connection file as a filter.)



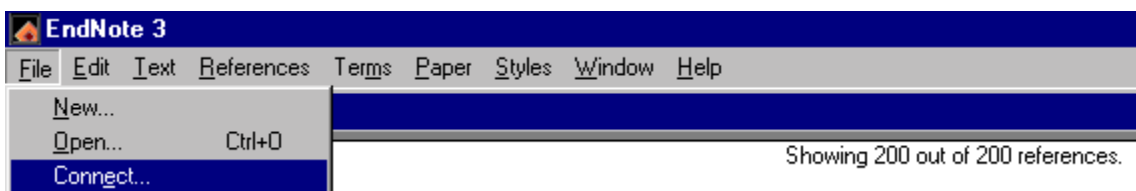
6. Select an option for treatment of duplicate references from the Duplicates list.
7. Click Import.

Connection Files

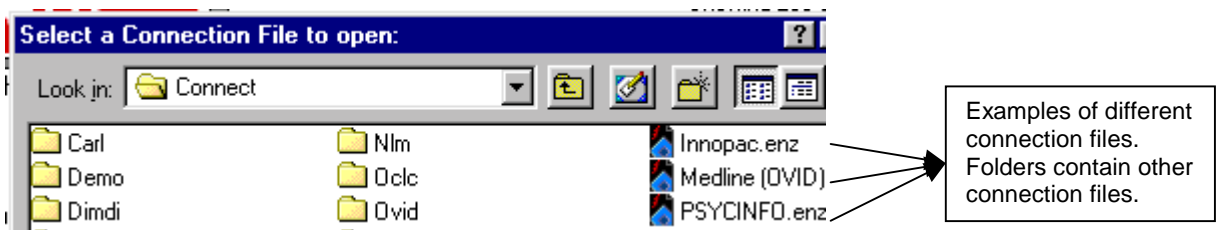
Using EndNote's Connect... and Search... commands, you can search online bibliographic databases just as easily as you can search an EndNote library on your own computer! The results of your searches appear as EndNote references—ready for you to store in your own EndNote library.

To connect to and search a remote database:

1. Choose File...Connect...

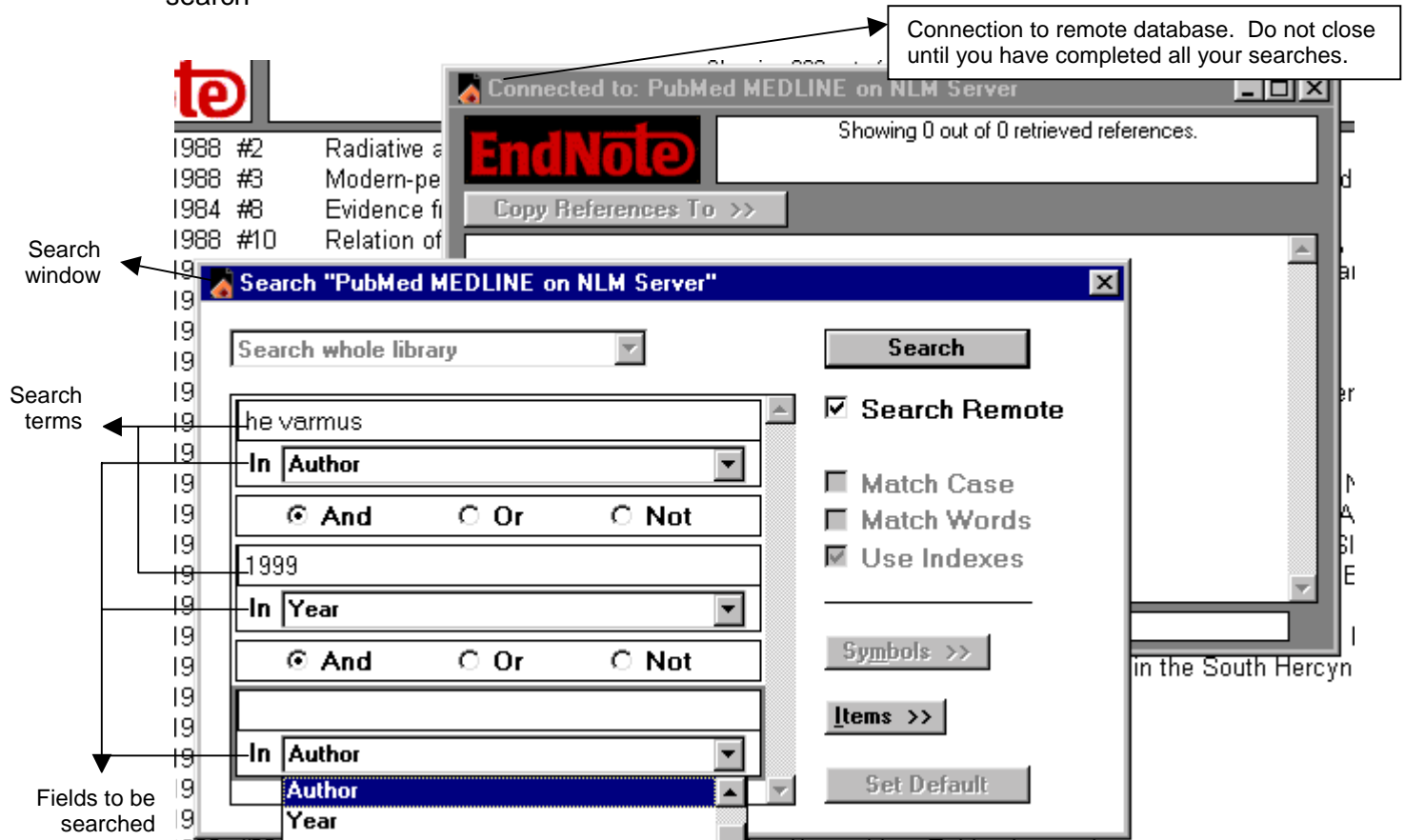


2. EndNote will display a standard file dialog. Locate the connection file appropriate for the database you wish to search and open the file.

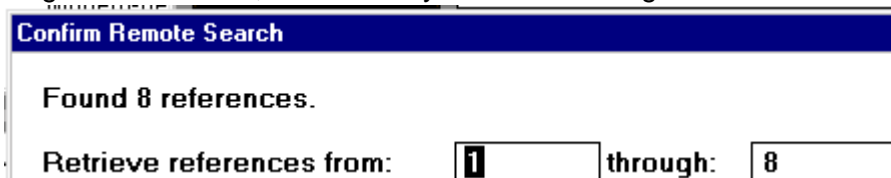


3. EndNote will attempt to establish communication with the database server. If you have a dial-up network connection and are not currently logged on, the network dialer should start. Log on to the network.

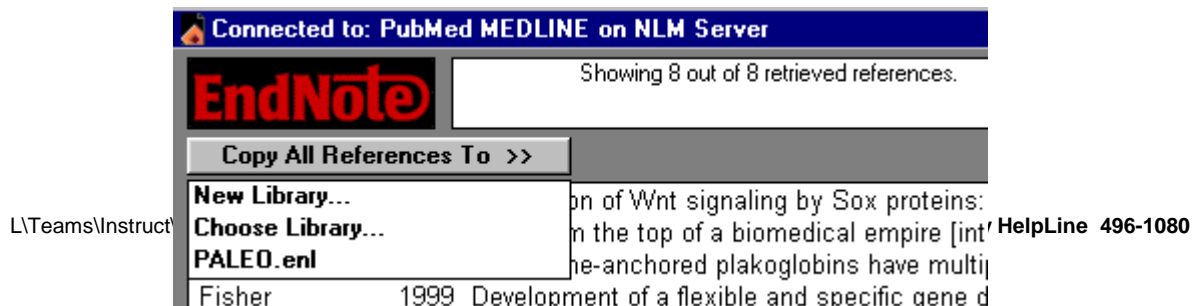
4. If the database server you wish to search requires password authentication, EndNote will display a password dialog. Enter your user ID and password for the server.
5. Once the connection to the database server has been established, EndNote will display an empty Retrieved References window and a search window. You are now ready to begin your search



6. If your search matches references in the databases, EndNote will display a dialog indicating the number of references found and asking you if you want to retrieve them. Click OK to begin retrieving the references, or cancel if you wish to change the search term.



7. EndNote will begin retrieving references from the server. To pause the retrieval, click on the Stop/resume button in the retrieved references window.
8. Select the references you wish to keep. Select multiple references by dragging the mouse or by clicking individual references while pressing the Shift or Ctrl keys. If no references are selected, all of the references are transferred.
9. Click on **Copy All References To** to transfer references to an open library (names of currently open libraries are listed in the menu), to a new library, or to an existing library that is not open.



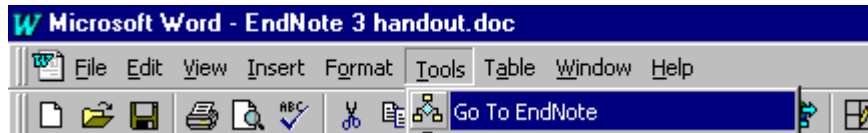
Creating bibliographies

EndNote also can be used to create bibliographies in the books and papers you are writing. Styles are used to control the appearance of references in a bibliography. A set of standard styles is installed in a \STYLES subdirectory of the directory where the EndNote program is located.

There are two ways you can use EndNote to generate formatted references in your documents. The method you use will depend on whether or not you have an EndNote add-in in your word processor:

Using Word Add-in To Insert Temporary EndNote Citations into your Word document:

1. Position the cursor at the point in the document where you want to insert the citation.
2. Select EndNote from the Word Tools menu.

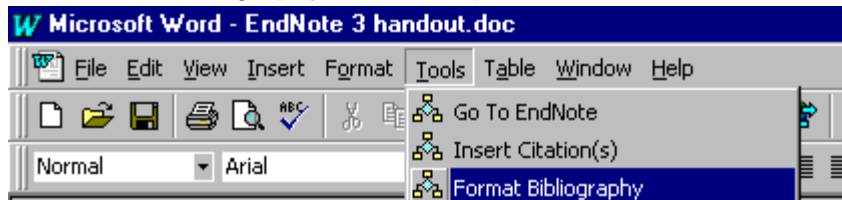


3. Select the reference(s) you want to cite. (See: Selecting references)
4. Select Insert Citation(s) from the EndNote Add-in menu to temporary citation into the Word document.

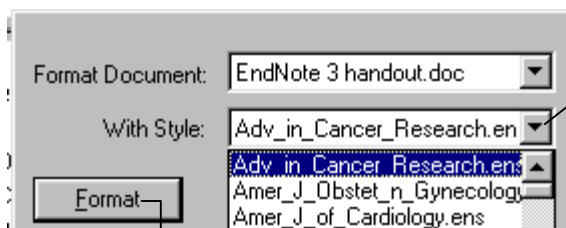


Formatting the Bibliography

1. Choose Format Bibliography from word processor's Tools menu



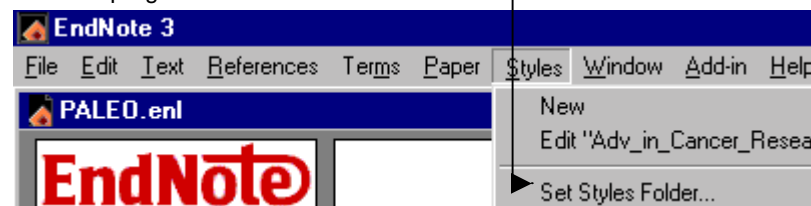
2. Select an appropriate Style from the list.



To format references in selected style

Click on down arrow to see list of styles. Select appropriate style for formatting.

List of styles is determined by the 'Set Styles Folder' command in the EndNote program



3. Click on Format to begin formatting the paper. EndNote replaces the in-text citations with an appropriate format and appends the reference to a bibliography at the end of the paper. If you need to make changes such as adding or deleting citations, make the changes and select the Format bibliography command to generate a new bibliography.
4. If you need to change the style, repeat steps 1-3.

Inserting Temporary EndNote Citations into your Word document without Word Add-in

Switch to EndNote. (To switch between programs, click the program icon on the Taskbar.)

1. Select the reference(s) to copy.
2. Select **Copy (Ctrl+C)** from the Edit menu.
3. Switch back to your word processor.
4. Select the **Paste (Ctrl+V)** command in the word processor's Edit menu.

Formatting the Bibliography

1. When the paper is complete, save it, then open the paper in EndNote.
2. EndNote will scan the paper, and match the temporary citations to references stored in your EndNote library.
3. EndNote will generate a new copy of your paper, identical to the original, except that the temporary citations are replaced by formatted citations, and the bibliography is added to the end of the document.
4. As you revise the paper, make the changes in your original document; repeat the formatting process to generate a new bibliography. You can add or delete citations, or format the bibliography in a different style.

Independent bibliographies can be generated using the File...Export... command.

To export references as a text file or independent bibliography:

1. Select the library containing the references to be exported.
2. Select the references you want to export, then choose **Show Selected** from the References menu. If you want to export the entire contents of the library, choose **Show All** from the References menu).
3. Choose **Sort** from the References menu if you want to change the order of the references.
4. Select the desired bibliographic style from the Styles menu.
5. Choose **Export** from the File menu.
6. Select the file type for the exported file.
7. Provide a name for the export file, and select the desired drive and directory.
8. Choose Save.

Bibliographic Database Downloading Formats for EndNote 3 (Win)

PubMed

- Select 'Medline' from Display choices.
- Save citations as a text file (e.g. filename.txt)

In Endnote,

- Choose File on toolbar, then choose Import
- From Import window, type in name of file, or use Find File from Choose file button.
- Click on Import option down menu. Choose Other Filters.
- Choose NLM (Grateful Med) folder, select Medline
- Click on Import.

Internet Grateful Med

- From the results screen, click on the Download for disk button
- From the IGM Download Format Screen, specify number of records to be downloaded, choose short or long record option.
- Click on select format button, select Tagged MEDLARS format. Click on Download Now.

In Endnote,

- Choose File on toolbar, then choose Import
- From Import window, type in name of file, or use Find File from Choose file button.
- Click on Import option drop down menu. Choose Other Filters.
- Choose NLM (Grateful Med) folder, select Medline
- Click on Import.

Web of Science

- Mark citations. Click on SUBMIT. Click on Marked List. *Note: to include fields such as abstract, check the Select field box. Select extra fields to be included in citations.
- Click on Save to File button. Save file as a text file (e.g. filename.txt)

In Endnote

- Choose File on toolbar, then choose Import
- From Import window, type in name of file, or use Find File from Choose file button.
- Click on Import option drop down menu. Choose Other Filters.
- Choose ISI folder, then choose **ISI Web of Science** filter. Click on Import.

Ovid Web Gateway

- Select items by clicking on the empty box to the left of a citation.
- Scroll down to Citation Manager.
- Under Citation Format, choose the Reprint/Medlars@ option.
- Internet Explorer Users: Under Action, click on Display. Use 'Save As' in File to save file. Save file with extension '.txt' (e.g. filename.txt)
- Netscape Users: Under Action, click on Save. Save file with extension .txt (e.g. filename.txt)

In Endnote,

- Choose File on toolbar, then choose Import
- From Import window, type in name of file, or use Find File from Choose file button.
- Click on Import option down menu. Choose Other Filters.
- Choose OVID folder, choose Ovid - (Reprint format) filter. Click on Import.